


The **CMO** Survey[®]  FEBRUARY 2020

Topline Report

Predicting the future of markets, tracking marketing excellence,
improving the value of marketing since 2008

Deloitte.



AMERICAN MARKETING
ASSOCIATION

Overview of The CMO Survey®

About The CMO Survey®

Mission

To collect and disseminate the opinions of top marketers in order to predict the future of markets, track marketing excellence, and improve the value of marketing in firms and society. The survey is an objective source of information about marketing and a non-commercial service dedicated to improving the field of marketing.

Administration

Founded in August 2008, The CMO Survey is administered twice a year. Questions repeat to observe trends over time and new questions are added to tap into marketing trends. The February 2020 survey is the 24th administration of The CMO Survey.

Sponsors

CMO Survey Sponsors include the American Marketing Association, Deloitte LLP, and Duke University's Fuqua School of Business. Sponsors support The CMO Survey with intellectual and financial resources. Survey data and participant lists are held in confidence and not provided to survey sponsors or any other parties.

The February 2020 CMO Survey

Survey sample

2631 top marketers at U.S. for-profit companies; 265 responded for a 10.1% response rate; 98% of respondents are VP-level or above.

Survey administration

The survey was in field from January 7-28, 2020. It was administered via email with follow-up reminders.

Available reports

This *Topline Report* offers an aggregate view of survey results. Two other reports are available at cmosurvey.org/results:

- *Highlights and Insights Report* shares key metrics over time
- *Report of Results by Firm and Industry Characteristics* offers results by sectors, size, and Internet sales

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Topic 1: Marketplace Dynamics - Overall Economy**Are you more or less optimistic about the U.S. economy compared to last quarter?**

	Number	Percent	95% CI
3=More	42	30.7 %	± 4.4 %
2=No Change	48	35.0 %	± 4.7 %
1=Less	47	34.3 %	± 4.7 %
Total	137	100.0 %	

Mean = 1.96

SD = 0.81

Missing Cases = 128

Response Percent = 51.7 %

Topic 1: Marketplace Dynamics - Overall Economy

Rate your optimism about the U.S. economy on a scale from 0-100 with 0 being the least optimistic.

Minimum = 23.19

Maximum = 100

Mean = 62.72

Median = 65

Standard Deviation (Unbiased Estimate) = 19.46

95 Percent Confidence Interval Around the Mean = 59.40 - 66.04

Valid Cases = 132

Missing Cases = 133

Response Percent = 49.8%

Topic 1: Marketplace Dynamics - Customers

For this market, rank your customers' top three priorities (1, 2, 3) over the next 12 months, where 1 is most important.

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Low price	2.14 0.80	13 10.4%	18 14.4%	20 16.0%	51 40.8%
Superior product quality	2.02 0.79	28 22.4%	36 28.8%	30 24.0%	94 75.2%
Superior innovation	1.91 0.92	20 16.0%	7 5.6%	16 12.8%	43 34.4%
Excellent service	1.99 0.79	30 24.0%	37 29.6%	29 23.2%	96 76.8%
Trusting relationship	1.94 0.84	34 27.2%	26 20.8%	29 23.2%	89 71.2%

Topic 1: Marketplace Dynamics - Customers

Do you expect the following customer outcomes in the next 12 months?

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Customer's purchase volume	0.60 0.65	87 68.5%	29 22.8%	11 8.7%	127 100.0%
Customer's price per unit	0.28 0.72	55 43.7%	51 40.5%	20 15.9%	126 100.0%
Customer will buy related products/ services from my firm	0.70 0.51	92 72.4%	32 25.2%	3 2.4%	127 100.0%
My firm's ability to retain current customers	0.62 0.59	86 67.7%	34 26.8%	7 5.5%	127 100.0%
The entry of new customers into this market	0.42 0.67	65 52.0%	47 37.6%	13 10.4%	125 100.0%
My firm's ability to acquire new customers	0.77 0.48	98 79.0%	23 18.5%	3 2.4%	124 100.0%

Topic 1: Marketplace Dynamics - Partners**Will you use a channel or go directly to market?**

	Number	Percent	95% CI
Uses channel partners	191	72.1 %	± 5.4 %
Does not use channel partners	74	27.9 %	± 5.4 %
Total	265	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %

Topic 1: Marketplace Dynamics - Partners

Do you expect the following channel partner outcomes for your firm to increase, decrease, or have no change in the next 12 months?

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Partner's purchase volume	0.60 0.61	31 66.0%	13 27.7%	3 6.4%	47 100.0%
Partner will buy related products/ services from my firm	0.60 0.54	29 61.7%	17 36.2%	1 2.1%	47 100.0%
My firm will sell directly to end customers, not through channel partners	0.22 0.66	16 34.8%	24 52.2%	6 13.0%	46 100.0%
Partner's price per unit	0.13 0.79	17 37.8%	17 37.8%	11 24.4%	45 100.0%
Partner's level of power in our relationship	0.09 0.67	12 26.7%	25 55.6%	8 17.8%	45 100.0%

Topic 2: Firm Growth Strategies

Allocate 100 points to reflect your firm's spending in each of the four growth strategies during the prior 12 months.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Existing products/services in existing markets	54.0	27.6	49.5 - 58.6	50	0	100	141
New products/services in existing markets	20.5	18.9	17.4 - 23.7	20	0	100	141
Existing products/services in new markets	15.0	14.4	12.7 - 17.4	10	0	60	141
New products/services in new markets	10.4	15.7	7.8 - 13.0	5	0	100	141

Topic 2: Firm Growth Strategies

Allocate 100 points to reflect the corporate strategies your firm will use to grow during the next 12 months.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Growth from your firm internally	72.2	29.3	67.4 - 77.1	80	0	100	139
Growth from partnerships	11.4	17.1	8.5 - 14.2	5	0	80	139
Growth from acquisitions	11.3	18.2	8.2 - 14.3	0	0	90	139
Growth from licensing arrangements	5.1	13.2	2.9 - 7.3	0	0	100	139

Topic 2: Firm Growth Strategies

Rank order the following factors in importance for driving future organic revenue growth within your organization (1 = most important, 5 = least important).

	Mean & SD	1	2	3	4	5	Total
Having the right talent	2.28 1.16	41 30.8%	42 31.6%	29 21.8%	14 10.5%	7 5.3%	133 100.0%
Having the right operating model	2.67 1.34	34 25.6%	30 22.6%	31 23.3%	22 16.5%	16 12.0%	133 100.0%
Having all stakeholders aligned	2.78 1.52	41 30.8%	20 15.0%	26 19.5%	19 14.3%	27 20.3%	133 100.0%
Having the right data	3.57 1.15	6 4.5%	22 16.5%	26 19.5%	48 36.1%	31 23.3%	133 100.0%
Having the right technology	3.70 1.34	11 8.3%	19 14.3%	21 15.8%	30 22.6%	52 39.1%	133 100.0%

Topic 2: Firm Growth Strategies**What percent of your marketing budget do you spend on domestic markets?**

Minimum = 42.57

Maximum = 100

Mean = 87.43

Median = 95

Standard Deviation (Unbiased Estimate) = 17.59

95 Percent Confidence Interval Around the Mean = 84.53 - 90.33

Valid Cases = 141

Missing Cases = 124

Response Percent = 53.2%

Topic 2: Firm Growth Strategies

What percent of your marketing budget does your company spend targeting the market in China?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What do you predict it will be 3 years from now?	4.20	8.92	2.67 - 5.73	0	0	50	130
Current?	2.05	6.72	0.92 - 3.18	0	0	50	136
What was this percentage 3 years ago?	1.67	5.45	0.74 - 2.60	0	0	45	132

Topic 2: Firm Growth Strategies**What percentage of your firm's sales is domestic?**

Minimum = 36.59

Maximum = 100

Mean = 84.35

Median = 95

Standard Deviation (Unbiased Estimate) = 20.11

95 Percent Confidence Interval Around the Mean = 81.03 - 87.67

Valid Cases = 141

Missing Cases = 124

Response Percent = 53.2%

Topic 2: Firm Growth Strategies**What percentage of your firm's sales is through the Internet?**

Minimum = 0

Maximum = 68.79

Mean = 13.51

Median = 2

Standard Deviation (Unbiased Estimate) = 21.70

95 Percent Confidence Interval Around the Mean = 10.79 - 16.22

Valid Cases = 246

Missing Cases = 19

Response Percent = 92.8%

Topic 3: Marketing Spending

What percentage of your firm's overall budget does marketing currently account for?

Minimum = 0

Maximum = 41.64

Mean = 11.32

Median = 7

Standard Deviation (Unbiased Estimate) = 10.86

95 Percent Confidence Interval Around the Mean = 9.47 - 13.16

Valid Cases = 133

Missing Cases = 132

Response Percent = 50.2%

Topic 3: Marketing Spending

Marketing expenses account for what percent of your firm's revenues?

Minimum = 0

Maximum = 45.87

Mean = 8.56

Median = 3

Standard Deviation (Unbiased Estimate) = 12.19

95 Percent Confidence Interval Around the Mean = 6.55 - 10.57

Valid Cases = 141

Missing Cases = 124

Response Percent = 53.2%

Topic 3: Marketing Spending**By what percent has your overall marketing spending changed in the prior 12 months?**

Minimum = -36.37

Maximum = 49.09

Mean = 5.82

Median = 1

Standard Deviation (Unbiased Estimate) = 15.74

95 Percent Confidence Interval Around the Mean = 3.29 - 8.35

Valid Cases = 149

Missing Cases = 116

Response Percent = 56.2%

Topic 3: Marketing Spending

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

Minimum = -25.30

Maximum = 42.27

Mean = 7.63

Median = 5

Standard Deviation (Unbiased Estimate) = 13.00

95 Percent Confidence Interval Around the Mean = 5.50 - 9.76

Valid Cases = 143

Missing Cases = 122

Response Percent = 54.0%

Topic 3: Marketing Spending

Marketing expenses in your company include the following (check all that apply):

	Number	Percent	95% CI
Direct expenses of marketing activities	142	92.8 %	± 4.1 %
Social media marketing	133	86.9 %	± 5.4 %
Brand-related expenses	123	80.4 %	± 6.4 %
Marketing employees	121	79.1 %	± 6.5 %
Marketing analytics	111	72.5 %	± 7.2 %
Marketing research	107	69.9 %	± 7.4 %
Other overhead costs associated with marketing	100	65.4 %	± 7.6 %
Customer experience expenses	90	58.8 %	± 7.9 %
Mobile marketing tools	86	56.2 %	± 8.0 %
Marketing training	83	54.2 %	± 8.0 %
Sales support tools	62	40.5 %	± 7.9 %
Sales employees	21	13.7 %	± 5.5 %
Total	1179		

Number of Cases = 153

Number of Responses = 1179

Average Number of Responses per Case = 7.7

Number of Cases with at least one Response = 153

Response Percent = 100.0 %

Topic 3: Marketing Spending

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	13.02	15.39	10.43 - 15.62	10	-24.13	52.61	135
Customer relationship management	8.98	13.93	6.60 - 11.36	5	-10	51.77	132
Brand building	7.07	13.62	4.78 - 9.37	5	-30.09	46.90	135
New product introductions	6.14	9.82	4.45 - 7.82	2	-20.06	33.94	130
New service introductions	3.66	6.62	2.53 - 4.79	0	-12.87	20.55	131
Traditional advertising spending	-0.43	12.54	-2.56 - 1.70	0	-36.28	36.07	133

Topic 3: Marketing Spending

By what percent has your spending on each type of marketing knowledge changed in the prior 12 months? Be sure to report the level and direction of the change. (e.g., 10%, 0%, -5%)

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Developing new marketing knowledge and capabilities	8.44	11.42	6.38 - 10.50	5	-10	42.36	118
Marketing research and intelligence	6.90	10.25	5.06 - 8.73	5	-10	41.14	120
Marketing consulting services	5.93	10.49	4.03 - 7.82	2	-20	38.56	118
Marketing training	3.30	6.57	2.12 - 4.48	0	-10	26.69	119

Topic 3: Marketing Spending

What percent of your marketing budget is currently devoted to training and development?

Minimum = 0

Maximum = 14.40

Mean = 4.70

Median = 5

Standard Deviation (Unbiased Estimate) = 4.25

95 Percent Confidence Interval Around the Mean = 3.94 - 5.45

Valid Cases = 122

Missing Cases = 143

Response Percent = 46.0%

Topic 3: Marketing Spending

What percent of your marketing budget do you spend on initiatives related to customer experience?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What do you predict it will be 3 years from now?	20.63	21.94	16.93 - 24.34	12	0	100	135
Current	15.24	20.30	11.84 - 18.64	10	0	100	137
What was this percentage 3 years ago?	8.93	16.43	6.16 - 11.71	2	0	100	135

Topic 4: Financial and Marketing Performance

Rate your firm's performance during the last 12 months.

	Mean & SD	-10%	-7%	-5%	-3%	-1%	0	+1%	+3%	+5%	+7%	+10%	Total
Sales revenue	4.36 5.25	5 3.9%	3 2.4%	3 2.4%	4 3.1%	0 0.0%	9 7.1%	6 4.7%	27 21.3%	18 14.2%	15 11.8%	37 29.1%	127 100.0%
Profits	3.83 5.21	6 4.8%	0 0.0%	3 2.4%	4 3.2%	5 4.0%	17 13.5%	7 5.6%	19 15.1%	22 17.5%	10 7.9%	33 26.2%	126 100.0%
Customer acquisition	3.80 4.67	3 2.5%	0 0.0%	3 2.5%	2 1.7%	3 2.5%	19 15.8%	15 12.5%	19 15.8%	22 18.3%	4 3.3%	30 25.0%	120 100.0%
Marketing ROI	3.59 4.21	2 1.7%	0 0.0%	2 1.7%	3 2.5%	0 0.0%	23 19.3%	14 11.8%	23 19.3%	25 21.0%	4 3.4%	23 19.3%	119 100.0%
Market share	3.37 4.08	1 0.8%	1 0.8%	4 3.2%	4 3.2%	1 0.8%	15 11.9%	23 18.3%	24 19.0%	24 19.0%	10 7.9%	19 15.1%	126 100.0%
Brand value	3.09 4.30	3 2.6%	0 0.0%	1 0.9%	1 0.9%	3 2.6%	32 27.4%	13 11.1%	21 17.9%	19 16.2%	3 2.6%	21 17.9%	117 100.0%
Customer retention	2.31 4.47	3 2.5%	0 0.0%	2 1.7%	8 6.8%	7 5.9%	33 28.0%	12 10.2%	17 14.4%	13 11.0%	5 4.2%	18 15.3%	118 100.0%

Topic 4: Financial and Marketing Performance

How often does your company rely on the following KPIs for evaluating marketing performance?

	Mean SD	Not at all Important	1	2	3	4	5	6	All the time 7	Total
ROI	4.66 1.91	12 9.3%	10 7.8%	12 9.3%	18 14.0%	30 23.3%	18 14.0%	29 22.5%	129 100.0%	
YOY growth	5.41 1.81	9 7.1%	5 3.9%	3 2.4%	13 10.2%	24 18.9%	24 18.9%	49 38.6%	127 100.0%	
Metrics such as market share, sales, and profits	5.08 1.79	10 7.8%	5 3.9%	5 3.9%	23 17.8%	20 15.5%	34 26.4%	32 24.8%	129 100.0%	
Forward-looking metrics (e.g., NPS or customer lifetime value)	3.70 1.99	26 20.3%	20 15.6%	12 9.4%	16 12.5%	26 20.3%	18 14.1%	10 7.8%	128 100.0%	

Topic 4: Financial and Marketing Performance

Overall, how would you rate your company's marketing excellence?

	Number	Percent	95% CI
7=Excellent - one of the best in the world	7	5.1 %	± 2.0 %
6=A leader but not one of the best	27	19.7 %	± 3.7 %
5=Strong	40	29.2 %	± 4.4 %
4=Good	28	20.4 %	± 3.7 %
3=Fair	26	19.0 %	± 3.6 %
2=Weak	7	5.1 %	± 2.0 %
1=Very weak	2	1.5 %	± 1.1 %
Total	137	100.0 %	

Mean = 4.50

SD = 1.35

Missing Cases = 128

Response Percent = 51.7 %

Topic 5: Social Media

What percent of your marketing budget do you spend on social media?

	Mean	SD	95% CI	Median	Total
...of your marketing budget do you currently spend on social media?	13.32	13.75	11.23 - 15.40	10	167
...will you spend in the next 12 months?	15.23	14.08	13.09 - 17.38	10	166
...do you predict you will spend in five years?	21.50	15.91	19.06 - 23.95	20	163

Topic 5: Social Media**What percent of your company's social media activities are currently performed by outside agencies?**

Minimum = 0

Maximum = 90.70

Mean = 24.12

Median = 5

Standard Deviation (Unbiased Estimate) = 31.85

95 Percent Confidence Interval Around the Mean = 19.25 - 29.00

Valid Cases = 164

Missing Cases = 101

Response Percent = 61.9%

Topic 5: Social Media

In-house vs. outsourcing of social media activities

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
How many people does your firm employ in-house to do social media?	3.1	4.3	2.4 - 3.8	1	0	16.8	164
What percentage of these social media employees are within marketing?	69.3	43.6	62.6 - 75.9	100	0	100	165
How many people does your firm employ from other companies to perform social media activities?	2.4	4.0	1.7 - 3.0	0.5	0	17	159

Topic 5: Social Media

Which best describes how you show the impact of social media on your business?

	Number	Percent	95% CI
We have proven the impact quantitatively	51	30.0 %	± 4.8 %
We have a good qualitative sense of the impact, but not a quantitative impact	64	37.6 %	± 5.2 %
We haven't been able to show the impact yet	55	32.4 %	± 4.9 %
Total	170	100.0 %	

Missing Cases = 95

Response Percent = 64.2 %

Topic 5: Social Media

To what degree has the use of social media contributed to your company's performance?

	Number	Percent	95% CI
1=Not At All	27	15.6 %	± 3.7 %
2=	36	20.8 %	± 4.2 %
3=	30	17.3 %	± 3.9 %
4=	33	19.1 %	± 4.0 %
5=	26	15.0 %	± 3.6 %
6=	14	8.1 %	± 2.7 %
7=Very Highly	7	4.0 %	± 2.0 %
Total	173	100.0 %	

Mean = 3.38

SD = 1.70

Missing Cases = 92

Response Percent = 65.3 %

Topic 6: Mobile Marketing

What percent of your marketing budget do you spend on mobile activities?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What percent of your marketing budget do you currently spend on mobile activities?	13.54	15.63	11.32 - 15.76	10	0	51.05	190
What percent will you spend on mobile activities in five years?	23.34	21.87	20.20 - 26.47	20	0	70.33	187

Topic 6: Mobile Marketing

How is your company's spend on mobile marketing allocated across the following categories?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Mobile Advertising - Social	25.58	27.08	21.55 - 29.62	20	0	100	173
User Experience	18.49	25.26	14.73 - 22.26	10	0	100	173
Other	17.96	35.43	12.68 - 23.24	0	0	100	173
Mobile Advertising - Display	15.84	21.37	12.65 - 19.02	10	0	100	173
Mobile Advertising - Video	11.99	15.76	9.64 - 14.34	5	0	75	173
Application Development	8.98	18.49	6.23 - 11.74	0	0	100	173

Topic 6: Mobile Marketing

To what degree has the use of mobile marketing contributed to your company's performance?

	Number	Percent	95% CI
1=Not At All	47	24.5 %	± 4.6 %
2=	37	19.3 %	± 4.2 %
3=	24	12.5 %	± 3.5 %
4=	32	16.7 %	± 4.0 %
5=	30	15.6 %	± 3.8 %
6=	15	7.8 %	± 2.8 %
7=Very Highly	7	3.6 %	± 1.9 %
Total	192	100.0 %	

Mean = 3.18

SD = 1.80

Missing Cases = 73

Response Percent = 72.5 %

Topic 6: Mobile Marketing

Which of the following factors limit the success of your company's mobile marketing activities? (check all that apply):

	Number	Percent	95% CI
Difficulty tracking the customer across the journey	73	42.2 %	± 7.4 %
Insufficient in-house mobile expertise	62	35.8 %	± 7.2 %
Unclear objectives for our mobile marketing strategy	58	33.5 %	± 7.1 %
Weak link between our mobile strategy and our broader marketing strategy	54	31.2 %	± 7.0 %
Difficulty identifying our mobile customer audience	45	26.0 %	± 6.6 %
Our content is not sufficiently personalized	44	25.4 %	± 6.6 %
Undisciplined approach to monitoring mobile metrics	38	22.0 %	± 6.2 %
Our content is not as engaging as it needs to be	36	20.8 %	± 6.1 %
Unclear ownership of mobile initiatives within the company	26	15.0 %	± 5.4 %
<u>Lack of a mobile-friendly website</u>	<u>25</u>	<u>14.5 %</u>	<u>± 5.3 %</u>
Total	461		

Number of Cases = 173

Number of Responses = 461

Average Number of Responses per Case = 2.7

Number of Cases with at least one Response = 173

Response Percent = 100.0 %

Topic 7: Marketing Jobs

Compared to the number of marketing hires last year, by what percentage will your firm's marketing hires change in the next year?

Minimum = -23.11

Maximum = 37.11

Mean = 5.79

Median = 1

Standard Deviation (Unbiased Estimate) = 10.47

95 Percent Confidence Interval Around the Mean = 3.94 - 7.63

Valid Cases = 124

Missing Cases = 141

Response Percent = 46.8%

Topic 7: Marketing Jobs**By what percentage will your firm's outsourcing of marketing activities change in the next year?**

Minimum = -21.07

Maximum = 30.86

Mean = 4.09

Median = 0

Standard Deviation (Unbiased Estimate) = 8.92

95 Percent Confidence Interval Around the Mean = 2.52 - 5.67

Valid Cases = 123

Missing Cases = 142

Response Percent = 46.4%

Topic 7: Marketing Jobs

How many employees/marketing employees are in your company?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Number of employees	8249	21170	4552 - 11945	750	0	103890	126
Number of marketing employees	60	131	37 - 83	12	0	580	125

Topic 8: Marketing Organization

Rate the quality of your company's marketing knowledge resources (1=Poor to 7=Excellent):

	Mean & SD	Poor 1	2	3	4	5	6	Excellent 7	Total
Marketing capabilities	4.74 1.47	4 3.2%	7 5.6%	12 9.6%	25 20.0%	35 28.0%	31 24.8%	11 8.8%	125 100.0%
Customer insights	4.42 1.64	9 7.0%	11 8.6%	12 9.4%	27 21.1%	34 26.6%	24 18.8%	11 8.6%	128 100.0%
Competitive intelligence	4.30 1.47	5 3.9%	11 8.6%	22 17.2%	25 19.5%	37 28.9%	23 18.0%	5 3.9%	128 100.0%
Marketing analytics	4.16 1.68	13 10.2%	12 9.4%	14 10.9%	26 20.3%	37 28.9%	18 14.1%	8 6.3%	128 100.0%
Marketing research	4.02 1.62	10 7.8%	15 11.7%	19 14.8%	35 27.3%	25 19.5%	15 11.7%	9 7.0%	128 100.0%
Marketing training	3.44 1.53	17 13.3%	20 15.6%	24 18.8%	38 29.7%	19 14.8%	6 4.7%	4 3.1%	128 100.0%

Topic 8: Marketing Organization

How does your company approach the development of new marketing capabilities? Allocate 100 points to indicate the emphasis you place on each approach.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
We build new marketing capabilities ourselves by training current or hiring new employees with the skills	57.88	31.07	52.43 - 63.33	60	0	100	125
We partner with other marketing agencies to learn new marketing skills	15.10	22.12	11.23 - 18.98	10	0	100	125
We partner with other companies to learn new marketing skills	12.22	15.24	9.54 - 14.89	10	0	80	125
We partner with other consultancies to learn new marketing skills	11.86	15.99	9.06 - 14.67	10	0	80	125
We buy other companies to acquire new marketing skills	2.94	11.40	0.94 - 4.93	0	0	95	125

Topic 9: Marketing Leadership

What is marketing primarily responsible for in your firm?

	Number	Percent	95% CI
Brand	135	90.0 %	± 4.9 %
Advertising	129	86.0 %	± 5.6 %
Digital marketing	129	86.0 %	± 5.6 %
Social media	121	80.7 %	± 6.4 %
Public relations	104	69.3 %	± 7.5 %
Marketing analytics	100	66.7 %	± 7.6 %
Promotion	98	65.3 %	± 7.7 %
Positioning	97	64.7 %	± 7.7 %
Marketing research	91	60.7 %	± 7.9 %
Lead generation	89	59.3 %	± 8.0 %
Insight	80	53.3 %	± 8.1 %
Customer experience	74	49.3 %	± 8.1 %
Competitive intelligence	71	47.3 %	± 8.1 %
Customer relationship management	60	40.0 %	± 7.9 %
Revenue growth	49	32.7 %	± 7.6 %
Market entry strategies	47	31.3 %	± 7.5 %
e-commerce	38	25.3 %	± 7.0 %
New products	34	22.7 %	± 6.8 %
Innovation	33	22.0 %	± 6.7 %
Pricing	31	20.7 %	± 6.6 %
Sales	28	18.7 %	± 6.3 %
Market selection	27	18.0 %	± 6.2 %
Customer service	24	16.0 %	± 5.9 %
Distribution	19	12.7 %	± 5.4 %
Stock market performance	2	1.3 %	± 1.9 %
Total	1710		

Number of Cases = 150

Number of Responses = 1710

Average Number of Responses per Case = 11.4

Number of Cases with at least one Response = 150

Response Percent = 100.0 %

Topic 9: Marketing Leadership

How important is marketing's role in each of the following strategic activities?

	Mean & SD	Not at all Important 1	2	3	4	5	6	Very Important 7	Total
Customer experience	5.01 1.88	8 5.3%	15 9.9%	11 7.2%	18 11.8%	27 17.8%	28 18.4%	45 29.6%	152 100.0%
Revenue growth	5.39 1.56	2 1.3%	6 3.9%	13 8.6%	21 13.8%	28 18.4%	32 21.1%	50 32.9%	152 100.0%
Pricing	3.55 2.05	33 22.0%	27 18.0%	18 12.0%	18 12.0%	22 14.7%	15 10.0%	17 11.3%	150 100.0%
Innovation	4.61 1.86	8 5.3%	17 11.3%	18 12.0%	28 18.7%	25 16.7%	20 13.3%	34 22.7%	150 100.0%

Topic 9: Marketing Leadership**Do you believe it is appropriate for your brand to take a stance on politically-charged issues?**

	Number	Percent	95% CI
Yes	28	18.5 %	± 3.7 %
No	123	81.5 %	± 6.1 %
Total	151	100.0 %	

Missing Cases = 114

Response Percent = 57.0 %

Topic 9: Marketing Leadership

Which of the following types of political activism do you think are appropriate for your brand? (check all that you believe are appropriate):

	Number	Percent	95% CI
Allowing employees to speak out on political issues	38	52.8 %	± 11.8 %
Making changes to products and services in response to political issues	34	47.2 %	± 11.8 %
Having executives speak out on political issues	24	33.3 %	± 11.2 %
Using marketing communications to speak out on political issues	20	27.8 %	± 10.6 %
Selecting partners on the basis of political stance	17	23.6 %	± 10.1 %
Total	133		

Number of Cases = 72

Number of Responses = 133

Average Number of Responses per Case = 1.8

Number of Cases with at least one Response = 72

Response Percent = 100.0 %

Topic 9: Marketing Leadership

Check all of the actions your company is likely to make in order to reduce the negative impact of its marketing-related activities on the ecological environment (check all that are likely or that your company has already taken).

	Number	Percent	95% CI
Changing products and/or services	62	72.9 %	± 9.6 %
Changing partners	48	56.5 %	± 10.8 %
Changing marketing promotions	42	49.4 %	± 10.9 %
Changing distribution	29	34.1 %	± 10.3 %
Changing market selection	17	20.0 %	± 8.7 %
Changing brand	11	12.9 %	± 7.3 %
Total	209		

Number of Cases = 85

Number of Responses = 209

Average Number of Responses per Case = 2.5

Number of Cases with at least one Response = 85

Response Percent = 100.0 %

Topic 10: Marketing Analytics

What percent of your marketing budget do you spend on marketing analytics?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Do you currently spend on marketing analytics?	6.05	6.50	4.96 - 7.14	5	0	24.12	136
Will you spend in on marketing analytics the next three years?	9.45	9.48	7.85 - 11.05	5	0	37.42	135

Topic 10: Marketing Analytics**In what percent of projects does your company use available or requested marketing analytics before a decision is made?**

Minimum = 0

Maximum = 100

Mean = 37.67

Median = 34

Standard Deviation (Unbiased Estimate) = 33.24

95 Percent Confidence Interval Around the Mean = 32.06 - 43.27

Valid Cases = 135

Missing Cases = 130

Response Percent = 50.9%

Topic 10: Marketing Analytics**Does your company formally evaluate the quality of marketing analytics?**

	Number	Percent	95% CI
Yes	76	53.1 %	± 5.5 %
No	67	46.9 %	± 5.3 %
Total	143	100.0 %	

Missing Cases = 122

Response Percent = 54.0 %

Topic 10: Marketing Analytics**In what percent of the time do you perform experiments to understand the impact of your marketing actions on customers?**

Minimum = 0

Maximum = 100

Mean = 34.56

Median = 27

Standard Deviation (Unbiased Estimate) = 28.50

95 Percent Confidence Interval Around the Mean = 29.80 - 39.31

Valid Cases = 138

Missing Cases = 127

Response Percent = 52.1%

Topic 10: Marketing Analytics

To what degree has the use of marketing analytics contributed to your company's performance?

	Number	Percent	95% CI
1=Not At All	18	12.4 %	± 3.1 %
2=2	21	14.5 %	± 3.3 %
3=3	25	17.2 %	± 3.6 %
4=4	22	15.2 %	± 3.4 %
5=5	29	20.0 %	± 3.8 %
6=6	19	13.1 %	± 3.1 %
7=Very Highly	11	7.6 %	± 2.4 %
Total	145	100.0 %	

Mean = 3.86

SD = 1.81

Missing Cases = 120

Response Percent = 54.7 %

Topic 10: Marketing Analytics

Which best describes how your company shows the long-term impact of marketing spend on your business?

	Number	Percent	95% CI
We prove the impact quantitatively	51	34.9 %	± 4.8 %
We have a good qualitative sense of the impact, but not a quantitative impact	64	43.8 %	± 5.2 %
We haven't been able to show the impact yet	31	21.2 %	± 3.9 %
Total	146	100.0 %	

Missing Cases = 119

Response Percent = 55.1 %

Topic 10: Marketing Analytics

To what extent is your company implementing artificial intelligence or machine learning into its marketing toolkit?

	Mean & SD	1=Not at all 1	2	3	4	5	6	7=Very Important 7	Total
Currently	2.11 1.65	78 55.7%	21 15.0%	19 13.6%	4 2.9%	11 7.9%	1 0.7%	6 4.3%	140 100.0%
Next three years	3.48 1.95	28 19.9%	24 17.0%	26 18.4%	20 14.2%	18 12.8%	9 6.4%	16 11.3%	141 100.0%

Topic 10: Marketing Analytics

How is your company using AI in its marketing activities? (check all that apply)

	Number	Percent	95% CI
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	36	46.2 %	± 11.3 %
Content personalization	35	44.9 %	± 11.3 %
Targeting decisions	28	35.9 %	± 10.9 %
Improving marketing ROI by optimizing marketing content and timing	28	35.9 %	± 10.9 %
Predictive analytics for customer insights	27	34.6 %	± 10.8 %
Customer segmentation	22	28.2 %	± 10.2 %
Conversational AI for customer service (i.e., chatbots, virtual assistants)	20	25.6 %	± 9.9 %
Augmented and virtual reality	15	19.2 %	± 9.0 %
Next best offer	8	10.3 %	± 6.9 %
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	5	6.4 %	± 5.6 %
Facial recognition and visual search	5	6.4 %	± 5.6 %
Biometrics also known as chipping (i.e., body or hand implants)	3	3.8 %	± 4.4 %
Total	232		

Number of Cases = 78

Number of Responses = 232

Average Number of Responses per Case = 3.0

Number of Cases with at least one Response = 78

Response Percent = 100.0 %

Topic 10: Marketing Analytics

To what extent are blockchain technologies affecting your company's marketing strategies?

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very Important	Total
Currently	1.36 1.01	120 85.7%	5 3.6%	4 2.9%	8 5.7%	2 1.4%	0 0.0%	1 0.7%	140 100.0%
Next three years	1.94 1.43	77 55.0%	35 25.0%	8 5.7%	8 5.7%	6 4.3%	4 2.9%	2 1.4%	140 100.0%

Topic 11: The CMO Survey Award for Marketing Excellence

Which company across all industries sets the standard for excellence in marketing? – Overall Winner

Apple, Inc.

Topic 11: The CMO Survey Award for Marketing Excellence

Which company across all industries sets the standard for excellence in marketing? - Industry-Specific Winners

Technology:

- Amazon
- Salesforce

Consumer Products:

- Coca-Cola Inc.
- Nike
- Proctor & Gamble

Consumer Services:

- Disney

Appendix: Firm-level Descriptive Information

Which economic sector accounts for the majority of your company revenues?

	Number	Percent	95% CI
B2B - Product	96	36.4 %	± 5.8 %
B2B - Services	77	29.2 %	± 5.5 %
B2C - Product	51	19.3 %	± 4.8 %
B2C - Services	40	15.2 %	± 4.3 %
Total	264	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %

Appendix: Firm-level Descriptive Information

Which industry sector best describes your company?

	Number	Percent	95% CI
Technology [Software/Biotech]	41	15.5 %	± 4.4 %
Healthcare/Pharmaceuticals	35	13.2 %	± 4.1 %
Professional Services/Consulting	35	13.2 %	± 4.1 %
Retail/Wholesale	26	9.8 %	± 3.6 %
Communications/Media	23	8.7 %	± 3.4 %
Manufacturing	23	8.7 %	± 3.4 %
Consumer Packaged Goods	21	7.9 %	± 3.3 %
Banking/Finance/Insurance/Real Estate	20	7.5 %	± 3.2 %
Transportation	13	4.9 %	± 2.6 %
Consumer Services	11	4.2 %	± 2.4 %
Education	8	3.0 %	± 2.1 %
Mining/Construction	5	1.9 %	± 1.7 %
Energy	4	1.5 %	± 1.5 %
Total	265	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %

Appendix: Firm-level Descriptive Information

What is the number of employees in your company?

	Number	Percent	95% CI
Fewer than 100	72	27.3 %	± 5.4 %
100-499	45	17.0 %	± 4.6 %
500-999	18	6.8 %	± 3.1 %
1,000-2,499	30	11.4 %	± 3.8 %
2,500-4,999	21	8.0 %	± 3.3 %
5,000-9,999	15	5.7 %	± 2.8 %
More than 10,000	63	23.9 %	± 5.2 %
Total	264	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %

Appendix: Firm-level Descriptive Information

What was your firm's sales revenue in last 12 months?

	Number	Percent	Cumulative
Less than \$25 million	71	27.3 %	27.3 %
\$26-99 million	32	12.3 %	39.6 %
\$100-499 million	45	17.3 %	56.9 %
\$500-999 million	16	6.2 %	63.1 %
\$1-2.5 billion	25	9.6 %	72.7 %
\$2.6-5 billion	16	6.2 %	78.8 %
\$5.1-9.9 billion	15	5.8 %	84.6 %
\$10-49 billion	28	10.8 %	95.4 %
\$50-100 billion	6	2.3 %	97.7 %
More than \$100+ billion	6	2.3 %	100.0 %
Total	260	100.0 %	100.0 %

Missing Cases = 5

Response Percent = 98.1 %